



User Guide

Module PRODUCT v2.0

ECONOMIX Solutions



User Guide 1



MODULE PRODUCT



Module **PRODUCT**

Introduction to the module

The module « PRODUCT » is designed to answer your needs in the management of your product forms. This tool allows you to manage entirely the information related to your products, with two functions integrated to other Economix solutions modules:

-  Creation/modification of active product forms
-  Integration of product forms to related modules



Module **PRODUCT**

Training plan

Reaching the module PRODUCT	4
Creating a product form.....	4
Assigning a supplier to a product form.....	4
Assigning a bar code to a product form	5
Assigning a general sale price to a product form	5
Creating a discount list for a product form.....	5
Associating a category to a product form.....	5
Assigning a status (Active/Inactive) to a product form.....	6
Activating taxes to a product form	6
Adding a picture to a product form	6
Assigning a supplier rate to a product form	6
Assigning various sale price to one same product form	7
Consulting the stocks from a product from.....	7
Registering a minimal desired stock quantity from a product form	7
Activating a free promotion to a product form.....	7
Activating a courtesy to a product form.....	8
Assigning a packing size to a product form	8
Creating a new product form from an inactive product form	8
Glance through the complete product list.....	8
Modifying/Reaching a specific product form.....	8
Adding one or more documents to a product form	9
Printing a product form.....	9



Module **PRODUCT**

Reaching the module **PRODUCT**



1. Click on the button **Product** or, under the menu **Forms**, click **Product**

Creating a product form



1. Click on the button **Add**
2. Complete the desired fields

NOTE The following fields must be completed during the first inscription:

Product form

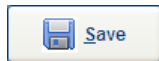
Model: Intern product code

Supplier: Name of the supplier

Supplier number: Supplier product code

Description (Fr): French description of the product for French customers

Description (En): English description of the product for English customers



3. Click on the button **Save** after completing the desired modifications, if need be

NOTE The date entered inside the model field must be unique.

NOTE While in creation mode of a product form, it is possible to register a starting stock quantity in the field **Stock** by having beforehand activated the **Manage stock** box under the tab Stock.

NOTE To create a gift certificate, name the product with the name of the gift certificate concerned.

NOTE To create a fixed discount, name the product with the name of the concerned discount and enter a negative price at the desired amount.

Assigning a supplier to a product form

1. From the desired product form, click on the drop-down menu **Supplier**

2. Select, among the list of suppliers, the desired supplier beforehand defined under the menu **Forms – Supplier**


Assigning a bar code to a product form

1. From the desired product form, click inside the field **UPC code**
2. Enter manually or capture automatically with the digital reader the data of the bar code

NOTE If your model number is identical to its bar code, it is strongly suggested to register it on both places.


3. Click **Save**  after completing the desired modifications, if need be

Assigning a general sale price to a product form

1. Position the cursor inside the field **Unite Price**
2. Enter the desired unite price
3. Click **Save**  after completing the desired modifications, if need be

NOTE The unite price is the regular price used by the system when no other price code is selected on the customer form.

Creating a discount list for a product form

1. Click on the button  of the field **Unite Price** to visualize the discount list already created and/or to create a new one
2. Click **Add** to add a new entry: quantity/price

NOTE Repeat this operation according to the number of entry: quantity/price of the price list.

NOTE To delete an entry: quantity/price of the price list, click on **Delete**.

3. Click **Exit** after completing the desired additions

NOTE This functionality is used for a product form when the unite price of the product varies according to the quantity bought.

Associating a category to a product form

1. Position the cursor inside the field **Category**
2. Press the **F2** key of your keyboard to visualize the list of categories already created and/or to create a new one
3. To add a new category, position the cursor inside the fields **Code – Description – GL** (General Ledger) and complete the information

NOTE It is possible to associate a General Ledger number to one or more categories.

4. Click **Add** to add the new category
5. Click **Close** after completing the desired additions

Assigning a status (Active/Inactive) to a product form

1. Form the desired product form, click on the radio button Status (Active/Inactive)

2. Click **Save**  after completing the desired modifications, if need be

NOTE Please note that all new product form created will be automatically defined like active, even though the radio button Status Active is not checked by the user

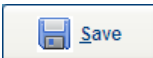
NOTE The deactivation of a product form removes this form of search tools while keeping its history not to falsify the data of administrative reports.

NOTE The deactivation of a product form is not allowed if the product is still in stock. If you still need to deactivate the product form, you have to adjust the quantity of the product in stocks to 0.

REFERENCE *Stocks – Stocks ajustement.*

Activating taxes to a product form

1. From the desired product form, click on the radio buttons G.S.T./P.S.T. (Yes/No)

2. Click the button **Save**  after completing the desired modifications, if need be


NOTE The radio buttons G.S.T. and P.S.T. can be checked at « No » for non-taxable products.

Adding a picture to a product form

1. From the desired product form, click **Picture**
2. Select the desired picture from your hard disk drive
3. Click **OK**

Assigning a supplier rate to a product form

1. From the desired product form, select the tab **Rate**
2. Inside the block **Rate**, click the field **Supplier**
3. Enter the cost price

4. Click on the button **Save**  after completing the desired modifications, if need be

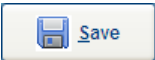
NOTE It is strongly suggested to complete the field **Supplier** during the first registration of a product form.

NOTE The field **Cost** of the block **Cost** is automatically generated by the system from an average of the cost of the received article.

NOTE The field **Increase** (desired increase) of the block **Cost** is manually generated by the user.

NOTE The field **Reel** (real increase) of the block **Cost** is automatically generated by the system by comparing your product receptions to the unite price of the article.

Assigning various sale price to one same product form

1. From the desired product form, select the tab **Price**
2. Inside the block **Price**, enter in the field **Price 1-7**, the desired price
3. Click on the button **Save**  after completing the desired modifications, if need be

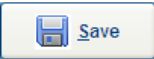
NOTE The feature **Price** is mainly used by companies having **diverse regular sale price** for the same product (eg: sale at multiple levels for the same distribution network).

WARNING The feature **Price** must not be used to manage your discounts.

Consulting the stocks from a product form

1. From the desired product form, select the tab **Stock**
2. Inside the block **Quantity**, consult the desired fields

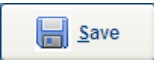
Registering a minimal desired stock quantity from a product form

1. From the desired product form, select the tab **Stock**
2. Inside the block **Quantity**, click the box **Manage stock**
3. Position the cursor inside the field **Stock**
4. Enter the minimal stock quantity desired
5. Click **Save**  after completing the desired modifications, if need be

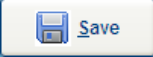
NOTE The activation of the box **Manage stock** indicates to the system to deduct the quantity in stock during a sale and to increase the quantity in stock during a reception of the goods.

WARNING The feature **Manage stock** must be only activated for a product and not for a service.

Activating a free promotion to a product form

1. From the desired product form, select the tab **Stock**
2. Inside the block **Promotion**, click in the box **Promotion**
3. Click **Save**  after completing the desired modifications, if need be

Activating a courtesy to a product form

1. From the desired product form, select the tab **Stock**
2. Inside the block **Others**, click the box **Courtesy**
3. Click **Save**  after completing the desired modifications, if need be


NOTE The activation of the box **Courtesy** indicates to the system to ask a reminder for this product during a first purchase by the customer.

Assigning a packing size to a product form



1. From the desired product form, select the tab **Stock**
2. Inside the block **Others**, position the cursor inside the field **Packing**
3. Enter the quantity of articles included by package when purchasing the product

REFERENCE *Stocks – Purchases - Receptions.*


Creating a new product form from an inactive product form

1. From the inactive product form, click the button **Idem**
2. Complete obligatorily the field Model
3. Click **Save**  after completing the desired modifications, if need be



Glance through the complete product list

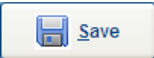
1. Click the button **Product** 
2. Click on the **arrows**  to consult the complete product list

NOTE The products are filed by model in the following order: 1. numerical codes (increasing order) 2. alphabetical codes (alphabetical order)


NOTE The **arrows**  help go directly to, respectively, the first and last existing product.

Modifying/Reaching a specific product form

1. Click the button **Products** 
2. Click **Search** 
3. Search for the desired product with the search criteria offered


4. Select, from the list of products corresponding to the search criteria used, the desired product by double-clicking
5. Click **Save**  after completing the desired modifications, if need be

Adding one or more documents to a product form

1. From the desired customer form, click **Attachment** 
2. Click **Add**
3. Select the desired document from your hard disk
4. Click **OK**
5. Click **Save** after completing the desired modifications, if need be

NOTE The documents attached can be of various formats: Word, Excel, PDF, etc.

Printing a product form

1. From the desired customer form, click **Print** 
2. Select the desired printer
3. Click **Print**